

ePlan User Access Form for LEAs

Tennessee's Electronic Planning and Grants Management System

Instructions:

1. Fill out **LEA-user** information. If the user needs role(s) for a charter school or community based organization, see ePlan.tn.gov > [TDOE Resources](#) > [User Access Forms](#) for the correct forms.
2. Write and/or select **new user access role(s)**; do not include existing role(s). See [ePlan User Access Roles for LEAs](#) for a complete list.
3. To remove and/or copy access from previous users, check the appropriate options and write in previous user(s)'s full names.
4. Obtain required signatures. [Adobe Certificated Signatures](#) are acceptable.
5. Email the completed form to ePlan.Help@tn.gov. **Copy all users who sign the form when submitting.**

User's Name: _____ LEA Name: _____ LEA ID #: _____

Email (ePlan User ID email, not SSO log-in): _____ Phone: _____

Funding Application/Grant Director Roles	
1	
2	
3	
4	
5	
6	
7	
Monitoring Roles	
1	
2	
3	
Other Roles	
1	
2	
3	

Data View	
<input type="checkbox"/>	LEA Data View Only: view all ePlan components, upload to LEA Document Library but can't edit other ePlan components. (Allows user to be selected as a contact in the CFA)
Fiscal & Approve Roles	
<input type="checkbox"/>	LEA Fiscal Update* (Bookkeeper): request reimbursements from any funding app (CFO approval required for this role)
<input type="checkbox"/>	LEA Fiscal Representative (CFO/Finance Director): fiscal approve funding app.; complete FER; submit state funds app.
<input type="checkbox"/>	Board Chair: approve state funds app.
<input type="checkbox"/>	County/City Clerk or SSD Recorder: approve state funds app.
<input type="checkbox"/>	LEA Authorized Representative: final approve any funding app. & monitoring document (Only Director of Schools may have this role)
LEA-Level Planning Roles	
<input type="checkbox"/>	LEA Plan Data Entry: edit LEA Plan. (This role is not for editing individual school plans.)
<input type="checkbox"/>	LEA School Plan Reviewer: edit, school- & LEA-approve school plan. (For LEA-level staff to review school plans)
<input type="checkbox"/>	LEA User Access Admin.: add users to edit school plan(s)

To copy and/or replace previous user(s): Select the correct check box(es) and provide name(s) of previous user(s)		
<input type="checkbox"/> Copy all access	<input type="checkbox"/> Remove all access <input type="checkbox"/> Remove access indicated above <u>only</u>	Previous User(s):

New User Signature and Date

New User Title

Director of Schools Signature and Date

CFO Signature and Date *Required for Fiscal Update users

Adobe Certificated Signatures are acceptable. Instructions are available at: <https://helpx.adobe.com/acrobat/using/certificate-based-signatures.html>